

STATE OF WISCONSIN
DEPARTMENT OF HEALTH AND FAMILY SERVICES
DIVISION OF MANAGEMENT AND TECHNOLOGY
BUREAU OF FISCAL SERVICES

ACCOUNTING PROCEDURE

TOPIC: Section 9--FMS Processing 9.0	EFFECTIVE DATE: 6/1/83
TITLE: Pre-Retirement Planning--Account Code	REVISION DATE: 03/18/02
AUTHORIZED BY: Cheryl Thompson, Deputy Director	PAGE 1 OF 1

BACKGROUND

In accordance with Executive Orders, state agencies participate in the Pre-Retirement Planning Program sponsored by the Department of Employment Relations.

The Wisconsin Technical College System (WTCS) offers a comprehensive pre-retirement training program of approximately 12 hours that is specifically designed for public employees. The program is offered statewide at all campuses of WTCS. The program includes:

- Financial Planning
- Legal Aspects
- Employment and Retirement
- Leisure
- Health and Life Insurance
- Housing
- Wellness and Health
- Consumerism

PROCEDURE

The employing unit will reimburse registration fees and the cost of a required book for employees 50 years of age and older, and their spouses. Employees should attach their paid registration form to a travel voucher (TL-Document), have their supervisor sign off on it, and submit to BFS Accounts Payable.

Pre-Retirement planning registration fees and cost of required book will be coded as follows:

<u>Org. Acct. Code</u>	<u>Organization Account Name</u>
21750	Pre-Retirement Training

REFERENCES

Department of Employee Trust Funds Website -(<http://etf.wi.gov/>) -
(Click on Retirement Planning, Pre-Retirement Planning)
DHFSweb - <http://dhfsweb/> -
(Click on Training, Learning Opportunities, Pre-Retirement Training)

CONTACT PERSON

Harlan Olson
Accounts Payable/Preaudit Section
(608) 267-9301